Section 3.3.2 OPTIONS MENU
Security - Define User
Roles Tab

Purpose	This section provides the procedures for a Department or Statewide Security Administrator to assign roles to users in DCDS by using the **Roles** tab.
Tabs	Roles
Reminders	1. The Roles tab is accessed through the <u>O</u>ptions, <u>S</u>ecurity, Define <u>U</u>sers items on the Menu bar.
	2. Each employee is assigned a role or multiple roles on DCDS. The role(s) specify which functions can be performed by the users on DCDS. Examples of a role include a timekeeper, certifier or releaser. Each role consists of a group of functions, any of which may be deleted or modified for that user.
	3. Roles are defined and maintained by the central agency. The list of centrally defined roles may be used as a default. Agencies may define their own roles to suit their individual needs. Centrally defined roles can be modified only by security administrators at a central agency level.
	4. Adding or deleting roles is typically used when a current user transfers to a new position, such as a timekeeper. The user needs new functions to do the work of the new position and most likely does not need access to the information used in the previous position.
	Continued

Roles Tab

Reminders *(Continued)*	**5.** The Roles tab displays two windows: ■ All Roles - Displays a list of roles available to the security administrator. ■ Selected Roles - Displays a list of roles assigned to a particular user. The same role will not appear on both sides at any point in time. A user may select roles from the All Roles window and move them to the Selected Roles window by using the buttons provided or by double clicking on a role. When a role is added or removed from the Selected Roles window, the data on the Functions tab will be updated to reflect all the functions associated with that role. Note that only the functions the security administrator has access to will be added. If the security administrator has a role but does not have some functions, those functions will not be added. **6.** The Refresh Roles button is used when functions assigned to a role are changed or a new function is assigned to the role. When a change or new function is added to a role, users will not automatically get those functions. To do that the role must be 'refreshed' for each user for which it was assigned. When the role highlighted in the Selected Roles window is refreshed, the functions are updated for the user(s) highlighted on the Selection tab. **7.** To refresh a role for all the users for which the role is assigned, access Options, Security, Define Roles window, enter selection criteria, then click on the Refresh Roles for All button. When the role is refreshed using this button, the functions for the role are updated for all the users for which the role is assigned. **8.** The default scope is the department, agency, and TKU that the user is assigned. However, a user may select a default department, agency, or TKU, if different from the assigned default scope from the dropdown menus on the Roles Tab.
References	*No specific references*

Roles Tab

The following window displays when the Roles tab is selected. The All Roles window displays the roles available for the department and agency selected. The Selected Roles window displays roles assigned to the user. The steps are described on the following page.

DCDS Input Procedures - Roles Tab

Follow the steps below to add/remove a role(s) for a selected user.

Step	Field Name	Action
Select Default Scope		
1	Dept, Agy, TKU	Select the Department, Agency, and Timekeeping Unit (TKU) as the default scope, if different from the one the user is currently assigned to.
Add a role for a new or existing DCDS user		
2	All Roles window	Highlight the role(s) to be added to the user. **Note:** To deselect a row, click on the highlighted role. This will remove the highlighting from the row.
3	`>`	Click on the `>` (Add) button located between the All Roles window and the Selected Roles window. This moves the highlighted role(s) to the Selected Roles window. Use the `>>` (Add All) button if all roles are to be added to the user.
Remove a Role		
4	Selected Roles window	Highlight the role(s) to be removed from the user being defined.
5	`<`	Click on the `<` (Remove) button located between the All Roles window and the Selected Roles window. This removes the role(s) from the user being defined. If all roles listed are to be removed, use the `<<` (Remove All) button. This button moves all the roles listed in the Selected Roles window back to the All Roles window.

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Step	Field Name	Action
6	Refresh Roles button	To update a role, highlight the role in the Selected Roles window and click on the Refresh Roles button. When functions assigned to a role are changed, the role must be 'refreshed' for each user for which it was assigned. When the role is refreshed, the functions for the role are updated for that user. A pop-up window displays to confirm that the role is refreshed. Click the OK button. **10248 - Done!** **i** Role refreshed. OK **Note:** The security administrators can assign only the functions that they themselves can access. Thus, if certain functions are meant for central agency use only, the other agency security administrators should not be given access to those functions. A pop-up window displays to notify when the security administrator does not have access to certain functions. **10288 - Missing Data!** **i** The Security Administrator does not have all the functions. Those will not be added. OK
7	Save button	Click on the Save button located at the bottom of the window (or press Alt + S) to save all changes made to the user's assigned roles. The changes take effect immediately.